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Smartphone Purchase Journey 2018

US Findings



P&E Marketing Analytics / October 2018

[go/us-purchase](#)

LINKS: [all 11 market reports](#), more team research at [go/android-insights](#)

Questions? email [Sammy Shan](#) @, [Emma Hong](#) @

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EXHIBIT 2903.R

EXHIBIT 2903.R-001

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Survey Methodology

- Online quantitative survey (25 minute length of interview) in the US fielded August 24 through September 10 in 2018
- Total Online Survey Sample: n=2,015; [Sample sizes can be found here](#)



Target Audience

- Qualification: Must have purchased a smartphone in the past 3 months for personal use (non-work related). All smartphone brand purchasers were included, regardless of their interest in Android.
- Respondent Age Range: Adults 18+

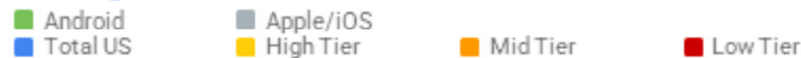
Tiering Definition

- Tiering definitions can be found here: ([go/AndroidDeviceTiers](#)). Android tiers are based on their hardware performance (RAM) and software experience (operating system version). iPhone tiers are mapped by launch date (most recent models are premium). Tiering process developed in collaboration between Google and GfK.

Statistical Significance

- Up/Down arrows indicate significant difference from average of total US respondents @ 90% confidence interval

Color Coding



Sample Size

- Sample groups with base sizes below 100 respondents are marked with *, interpret results with caution.

Differences from 2017 Study

- The 2017 Android Path to Purchase study had two differences in sample profile from this 2018 study:
 - The restriction of having to consider an Android smartphone was removed to get a better sense of total Apple purchasers.
 - This 2018 study focused on smartphones for personal use, while 2017 allowed work smartphones as an eligible device.

[Link to the 2018 Questionnaire doc](#)

Field Considerations:

- Samsung had released the S9 series at the time of fielding.
- iPhone XS, XS Max, and XR announced after field had closed.
- Pixel 3 and 3 XL announced after field had closed.



What did we learn?

Purchasing patterns

1 in 5 U.S. smartphone buyers in the past year were [first-time smartphone purchasers](#), and they favored Android.

There is more switching behavior between Android OEMs than churn to iOS.

Influence of apps

Users find apps installed by their OS to be more convenient than apps from carrier or OEM (e.g. Samsung, LG). However, the majority do not find [pre-installed apps](#) to be a major pain point.

[Voice assistant](#) has a more positive influence on purchase for iOS purchasers and is more important to Android to iOS switchers. This is likely because iOS purchasers prioritize having a high-tech, advanced device more so than [Android purchasers](#).

OS switchers

Android to iOS switchers were influenced more by OEM websites and TV ads, while iOS to Android switchers were heavily influenced by [retail associates](#).

Android to iOS switchers are drawn to more feature and brand attributes than iOS to Android switchers. Main drivers for iOS to Android switchers are [price and battery life](#).

Google

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What are
smartphone
shoppers
buying?

Goggle

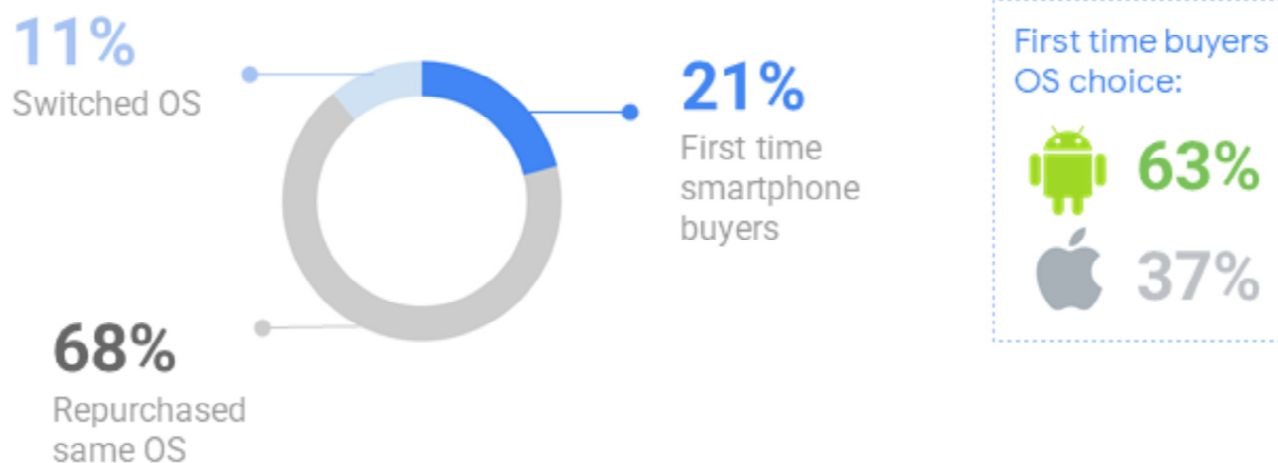
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1 in 5 shoppers in the sample were first-time smartphone purchasers, and the majority chose Android for their first smartphone.



S8.1 Of all the brands you considered, which brand of smartphone did you actually purchase?
Base: U.S. Experienced Smartphone Purchasers (n=965, 498); First time buyers (n=429)

A4. What was the brand of your previous smartphone? A3. Was this the first time you had ever purchased a smartphone?

Google

- Table 28, 68

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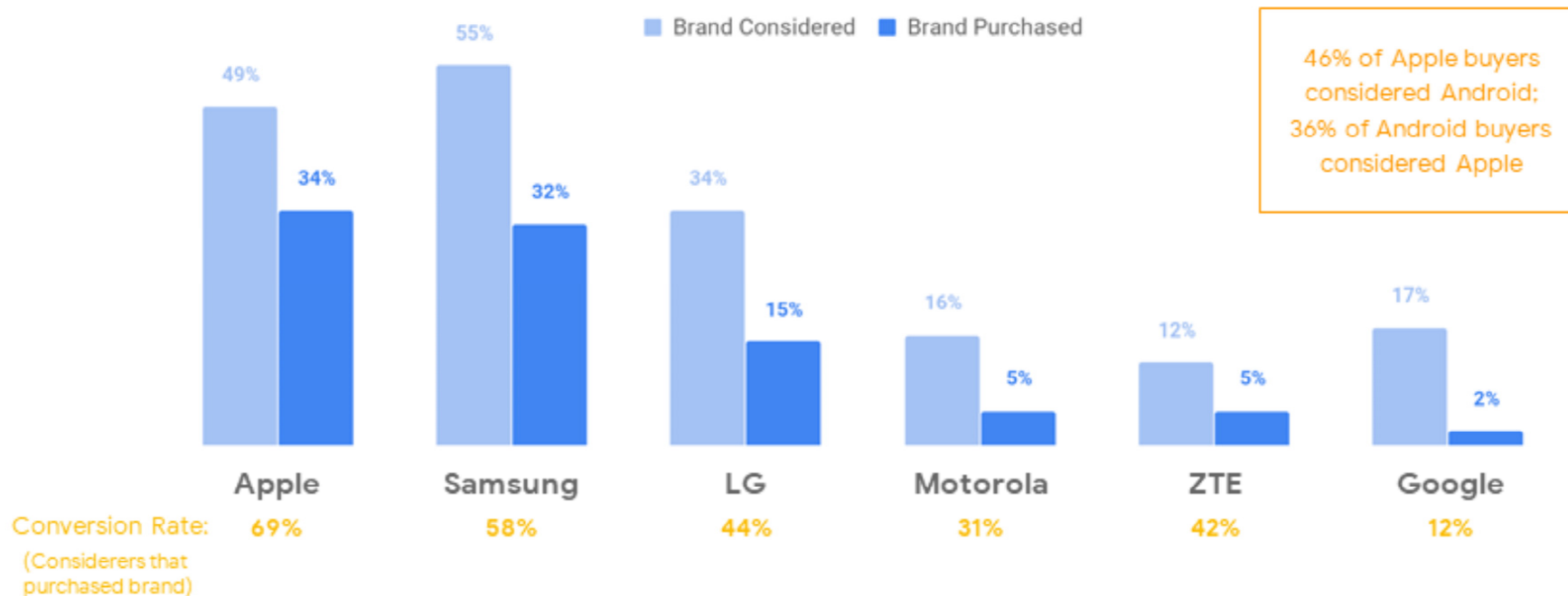
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Apple leads in converting shoppers into purchasers.



S8.0. You mentioned that you purchased a smartphone in the past 3 months. Please list ALL brand(s) of smartphones you considered purchasing. Be sure to include the brand of smartphone that you actually purchased.
 S8.1 Of all the brands you considered, which brand of smartphone did you actually purchase?

Base: U.S. Smartphone Purchasers (n=2015)

- Considered One Brand: 53.00%
- Considered Two Brands: 16.53%
- Considered Three Brands: 12.31%
- Considered Four Brands: 6.70%
- Considered Five Brands: 4.12%
- Considered Six or Seven: 4.02%
- Considered 8+: 3.33%

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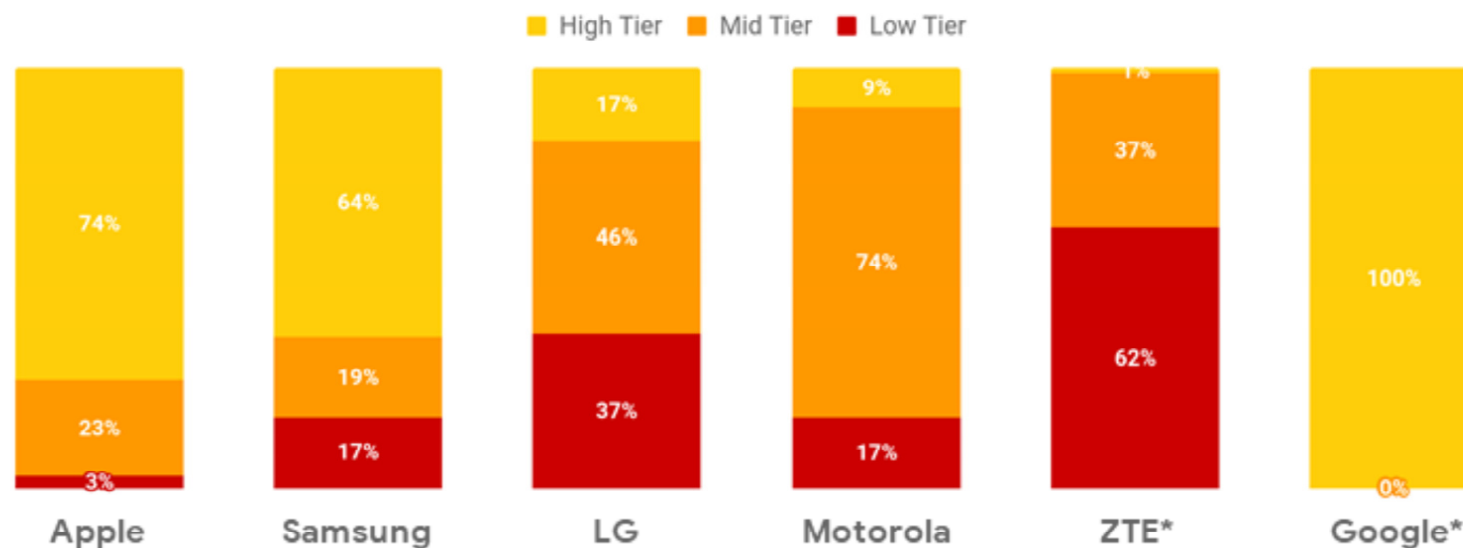
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1 in 4 Apple purchasers in the past 3 months bought an iPhone 6 device or older.

Tier Breakdown of Devices Purchased by OEM



S8.1 Of all the brands you considered, which brand of smartphone did you actually purchase?

Base: U.S. Smartphone iPhone Purchasers (n=705), U.S. Smartphone Samsung Purchasers (n=637), U.S. Smartphone LG Purchasers (n=319), U.S. Smartphone Motorola Purchasers (n=114), U.S. Smartphone ZTE Purchasers (n=85)*, U.S. Smartphone Pixel Purchasers (n=36)*. *Small base, interpret results with caution

A3. Was this the first time you had ever purchased a smartphone?

Google

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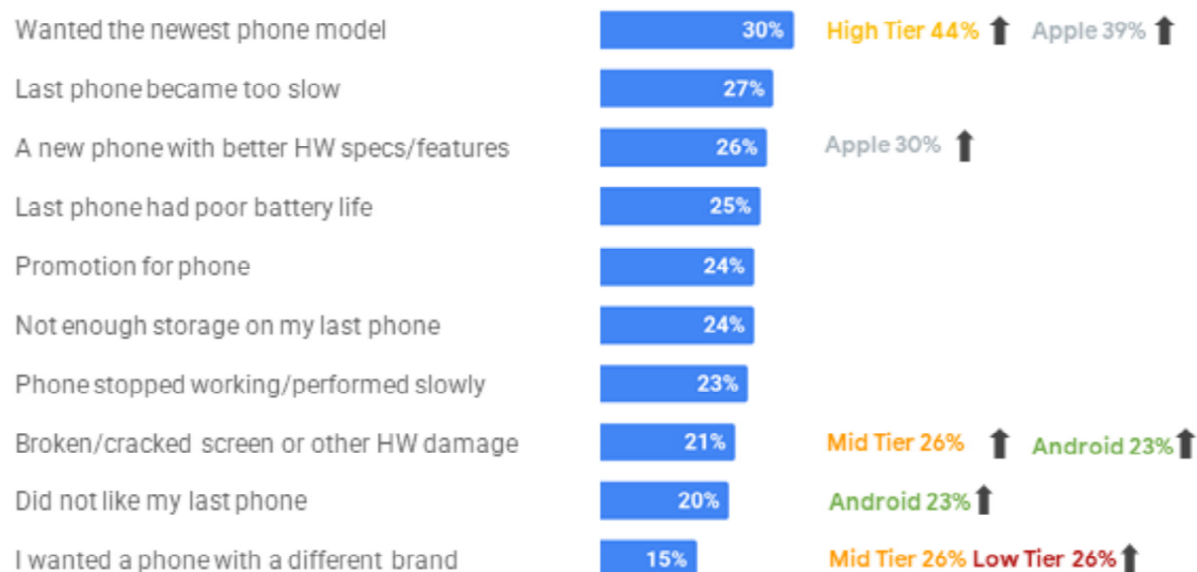
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Wanting the newest model was the top purchase trigger, particularly for Apple and High Tier smartphone buyers.

Top 10 Triggers for Smartphone Purchase



A1. The first few questions are focused on when you first decided you needed a new smartphone. Which of the following best describes the reason why you initially decided to purchase your smartphone?
 ↑ Indicates significant difference from U.S. Total at a 90% Confidence Level; *Small base, interpret results with caution

Google

- Table 58

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What did the
shoppers want?

Google
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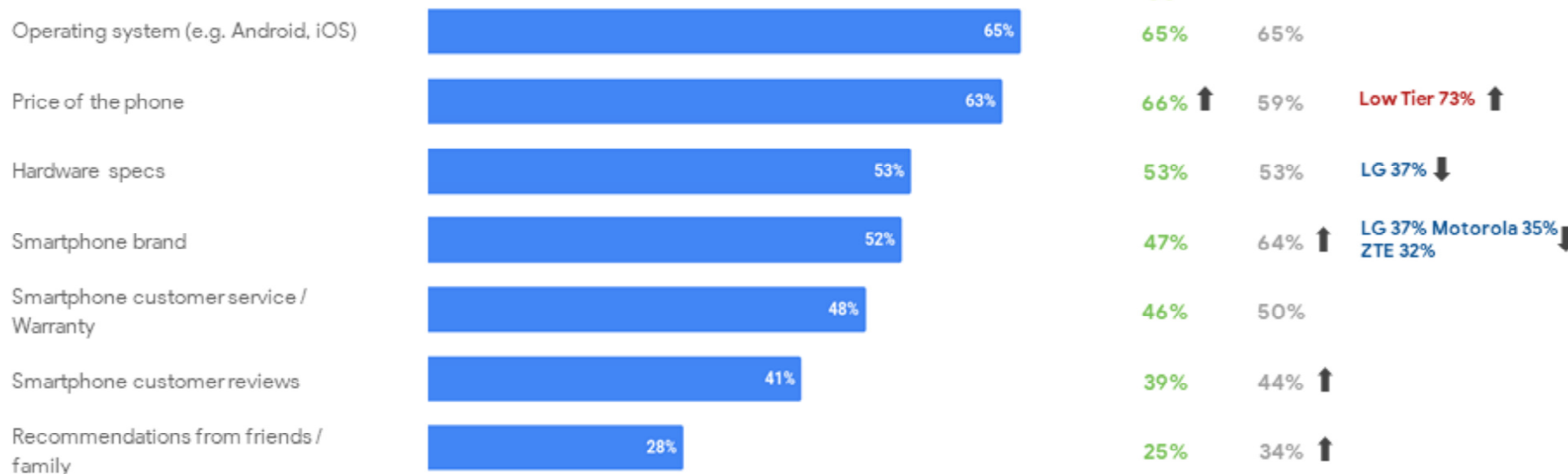
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OS is equally important to Android and iOS purchasers, while price is more important to Android purchasers.

Importance of Smartphone Elements for Purchase



A13. Below is a list of smartphone elements that may or may not be important to you. Using the scale shown below, please indicate how important or unimportant each element was to you when deciding which phone to purchase.
 Base: Total U.S. Smartphone Purchasers (n=2015), U.S. Smartphone Android Purchasers (n=1310), U.S. Smartphone iPhone Purchasers (n=705) ↑↓ Indicates significant difference from U.S. Total at a 90% Confidence Level

Google

- Table 129

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Having a phone with the most advanced features was significantly more important to iOS buyers and switchers to iOS.



Which of the following were important to you when shopping for your new smartphone?
% considered "very important"



A14. Please indicate the extent to which the following features were important to you when shopping for your new smartphone. Using the scale below, please rate each of the following items in terms of importance to you personally.
Base: U.S. Smartphone Purchasers (n=2015), U.S. Smartphone iPhone Purchasers (n=705), U.S. Smartphone Samsung Purchasers (n=637), U.S. Smartphone LG Purchasers (n=319), U.S. Smartphone Motorola Purchasers (n=114), U.S. Smartphone ZTE Purchasers (n=85)*, U.S. Smartphone Pixel Purchasers (n=36)*; *Small base, interpret results with caution
↑ Indicates significant difference from U.S. Total at a 90% Confidence Level

Google
12

- Table 142

EXHIBIT 2903.R-012

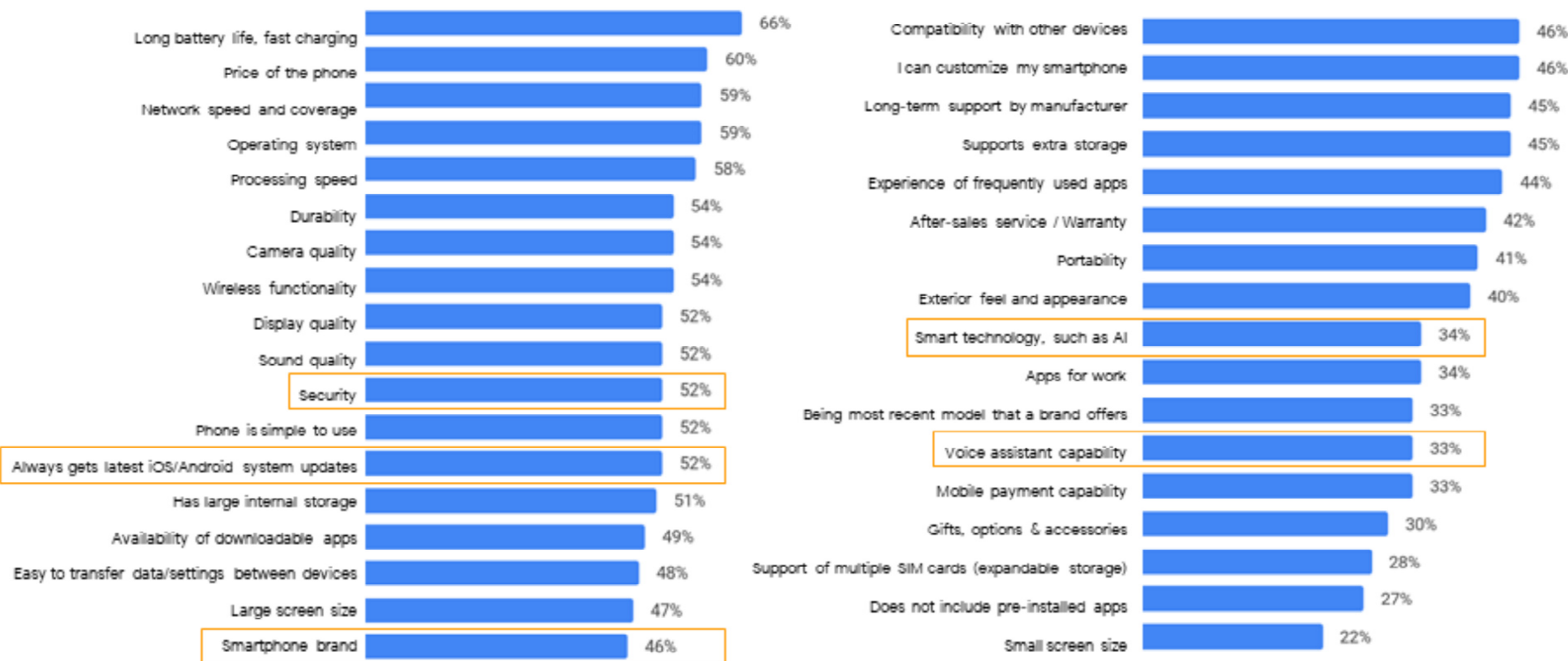
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Feature Importance for Smartphone Purchase

Top box out of 5 (average top box importance rating is 45%)



A18. Now, please indicate the extent to which of the following features were important to you when you were shopping for your new smartphone.
Base: U.S. Smartphone Purchasers (n=2015)

Google
13

- Tables 152-191

EXHIBIT 2903.R-013

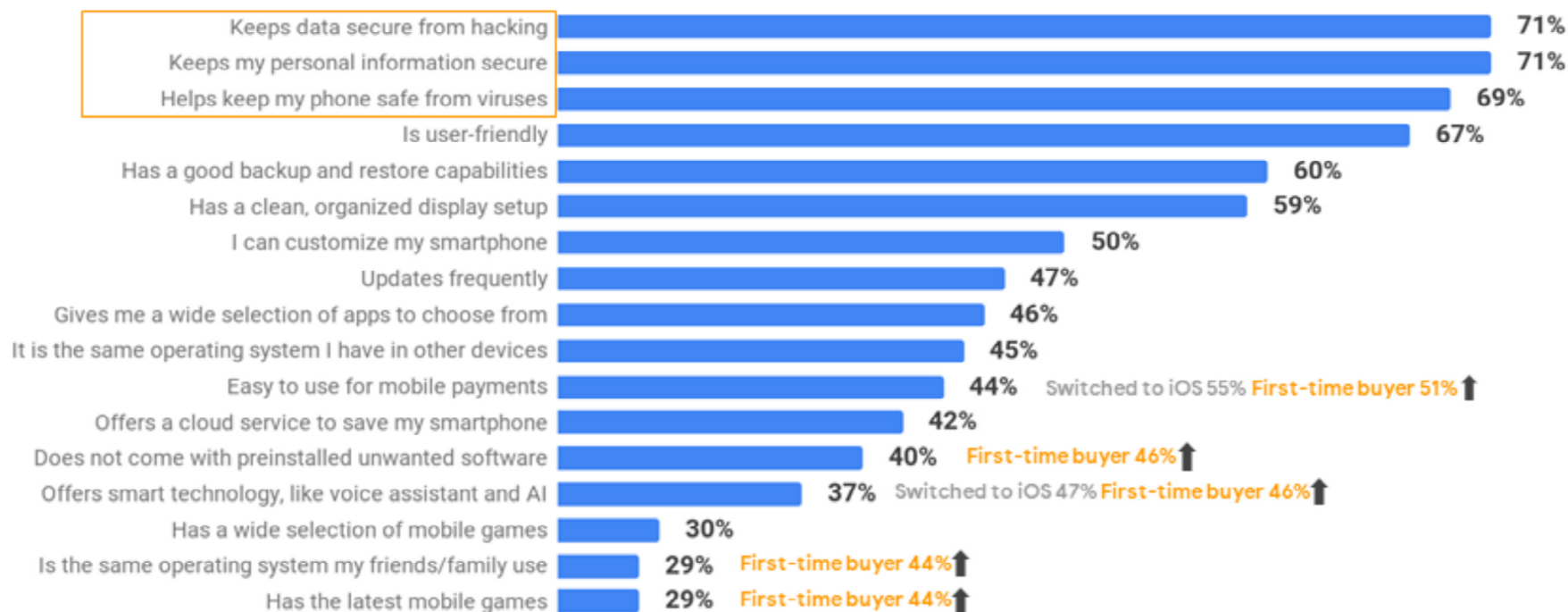
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Drill Down: Importance of OS Features

Among smartphone purchasers who said OS was important to them



A18e. Using the scale shown below, please indicate how important or unimportant each operating system (OS) feature is to you.
Base: U.S. Smartphone Purchasers T2B Importance in OS (n=1763)

Google
14

- Table 283

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Drill Down: Importance of Security Features

Among smartphone purchasers who said security was important to them



A18d. Using the scale shown below, please indicate how important or unimportant each aspect of smartphone security is to you.
Base: U.S. Smartphone Purchasers T2B Importance in Security (n=1720)

Google
15

- Table 269

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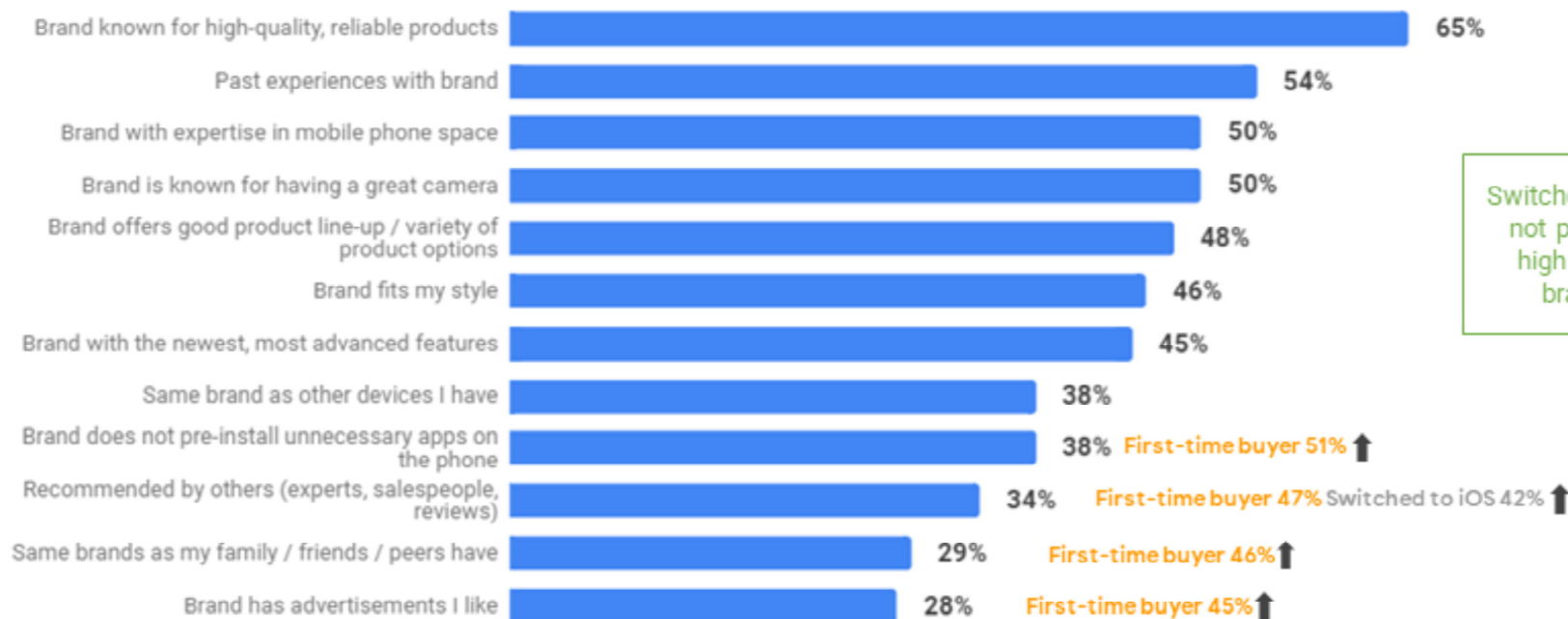
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Drill Down: Importance of Brand Features

Among smartphone purchasers who said brand was important to them



A18a. Please indicate the extent to which of the following "smartphone brand" factors did you consider important when purchasing your smartphone?
 Base: U.S. Smartphone Purchasers T2B Importance in Brand (n=1590)

Google
18

- Table 193
- Why First-Time buyers seem to overindex on caring about pre-installed apps --
- Could be based on usage patterns - 45% agreed completely that they "primarily use phone to make phone calls" (vs. 33% total) and 41% agreed completely that they "just want to use smartphone to make/receive calls, browse internet, check email, don't care about other features" (vs. 27% total). Still, they also found having up-to-date technology very important too.

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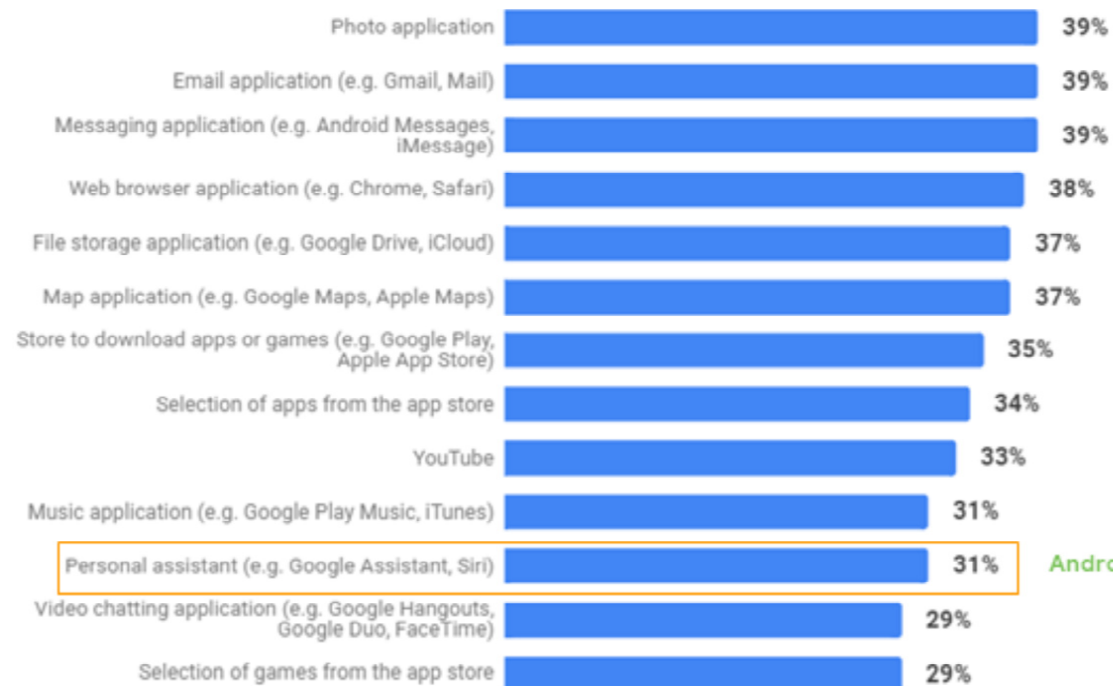
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Voice assistant had a more positive purchase influence on Apple purchasers than on Android purchasers.

Positive Influence of Apps on Device Purchase Decision



Android switchers are not pulled by any apps in a major way.



iOS has perceived advantage with video chatting apps.

Android Users 29% Apple Users 35%

C8. Please indicate how the following services and applications were influential in your decision to purchase your new smartphone. If you did not think about a listed service or application, please indicate this below. Base: U.S. Smartphone Purchasers (n=2015)

Google
17

- Table 560

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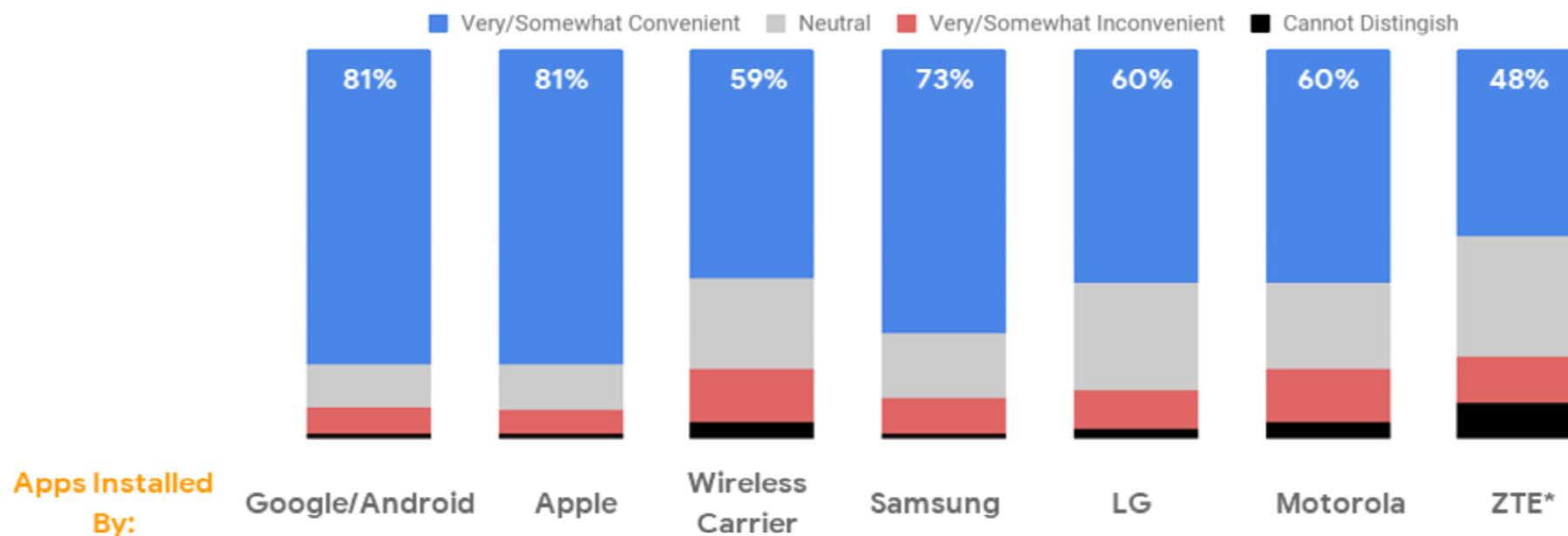
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Apps pre-installed by Google/Apple are considered more convenient than other OEM or carrier apps, but the majority find pre-installed apps of all kinds convenient.

How convenient is it to have these pre-installed apps? (Among Purchasers of OS/Carrier/OEM Brand)



A19b. Using the scale shown below, please indicate how convenient or inconvenient it is to have apps installed by these different companies?
 Base: U.S. Smartphone Purchasers (n=2015), Samsung (n=637), LG (n=319), Motorola (n=114), ZTE (n=85); *Small base, interpret results with caution

Google
18

- Table 225, 226, 265, 237, 235, 236, 244

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How did they
shop for their
smartphone?

Google
19

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Key facts about the smartphone purchase journey



63%

Purchased
in-store

55%

Completed process
within 2 weeks
(18% same day)

50%

Paid in full for phone
without signing
contract

28%

Received trade-in
credit for old phone

Google
20

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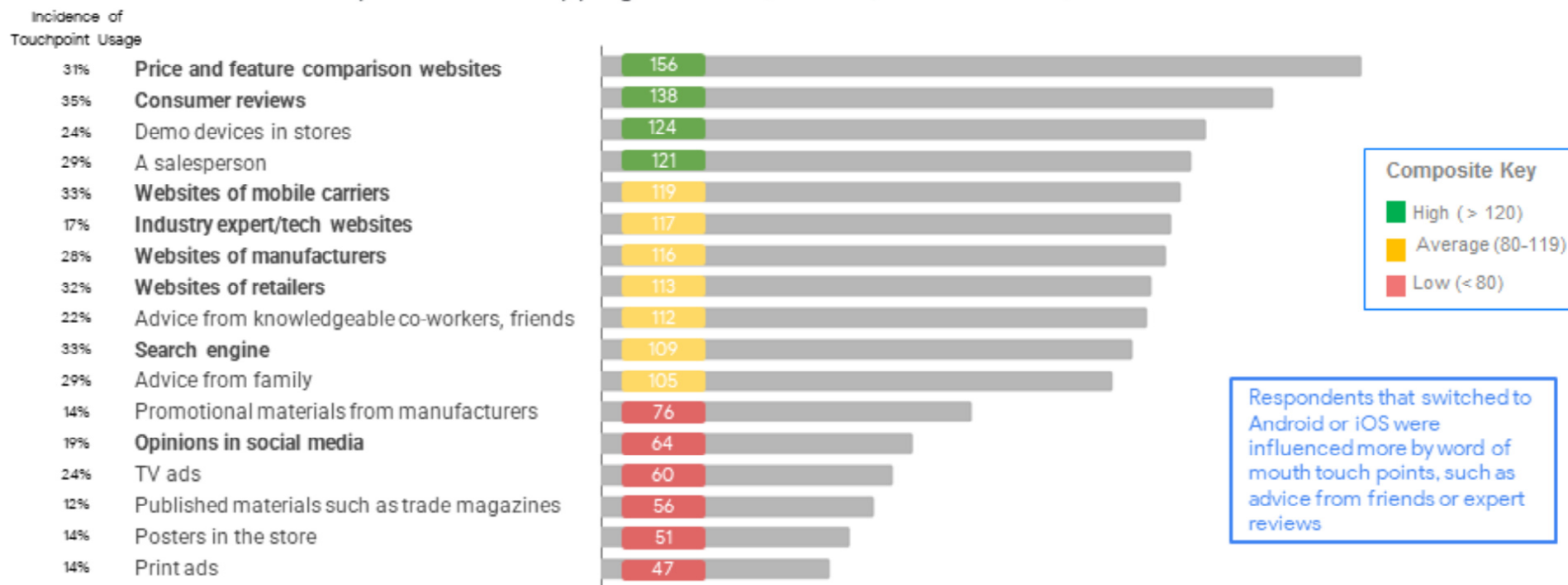
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Most important shopping activities include using comparison websites and online reviews.

Relative importance of shopping activities (indexed) **bold = online activity**



A24. Which one most influenced your decision to purchase your smartphone, and which one had the least influence.
 A20a/A20b. When you were shopping for a smartphone what online/offline sources of information do/ did you typically use?; Base: U.S. Smartphone Purchasers (n=2015)

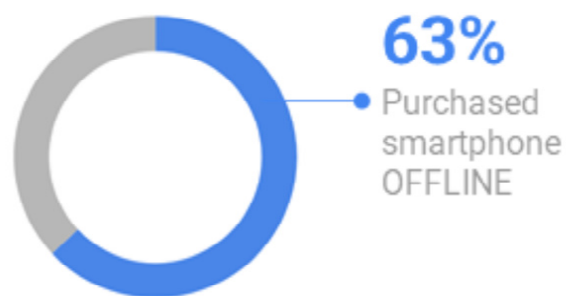
Google
21

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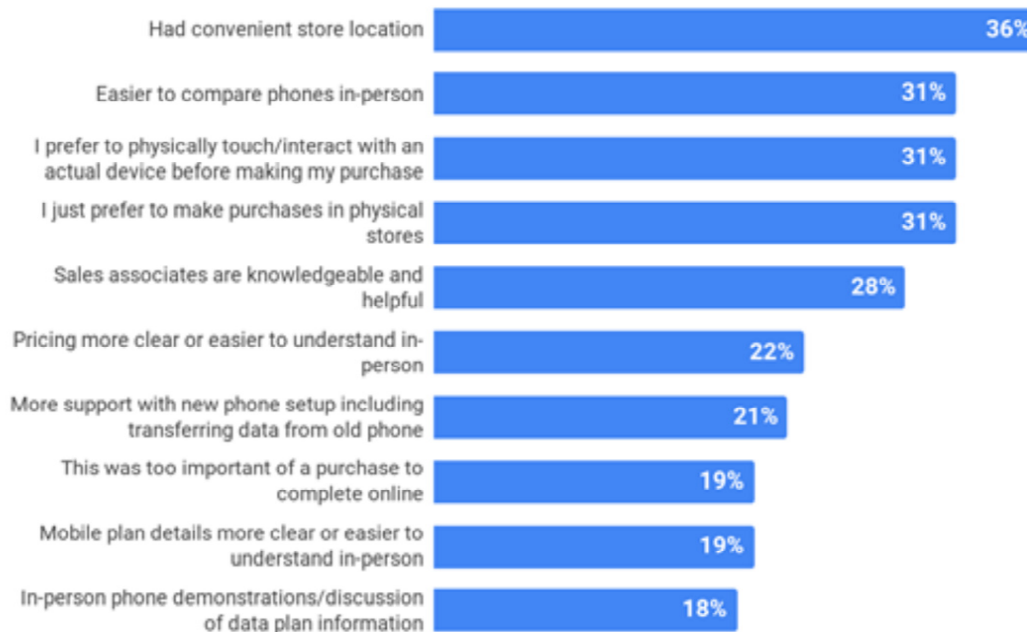
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Most purchases were completed offline as shoppers prefer the convenience of in-store interactions.



Top 10 reasons for purchasing device in-store among offline purchasers



A26/A27. At which of the following retailers did you shop for/ did you actually purchase your smartphone?

B4. Which of the following, if anything, were the reason(s) you decided to purchase your smartphone in a physical store rather than online? Base: U.S. Smartphone Offline Purchasers (n=1317)

Google
22

- Table 448

EXHIBIT 2903.R-022

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iOS to Android switchers are more likely to look up how to use products online when shopping in-store.



B3. Which of the following, if anything, did you do online on your mobile device while you were in a physical store on the day that you purchased your smartphone?
Base: U.S. Smartphone Purchasers (n=2015)

Google
23

- Table 447

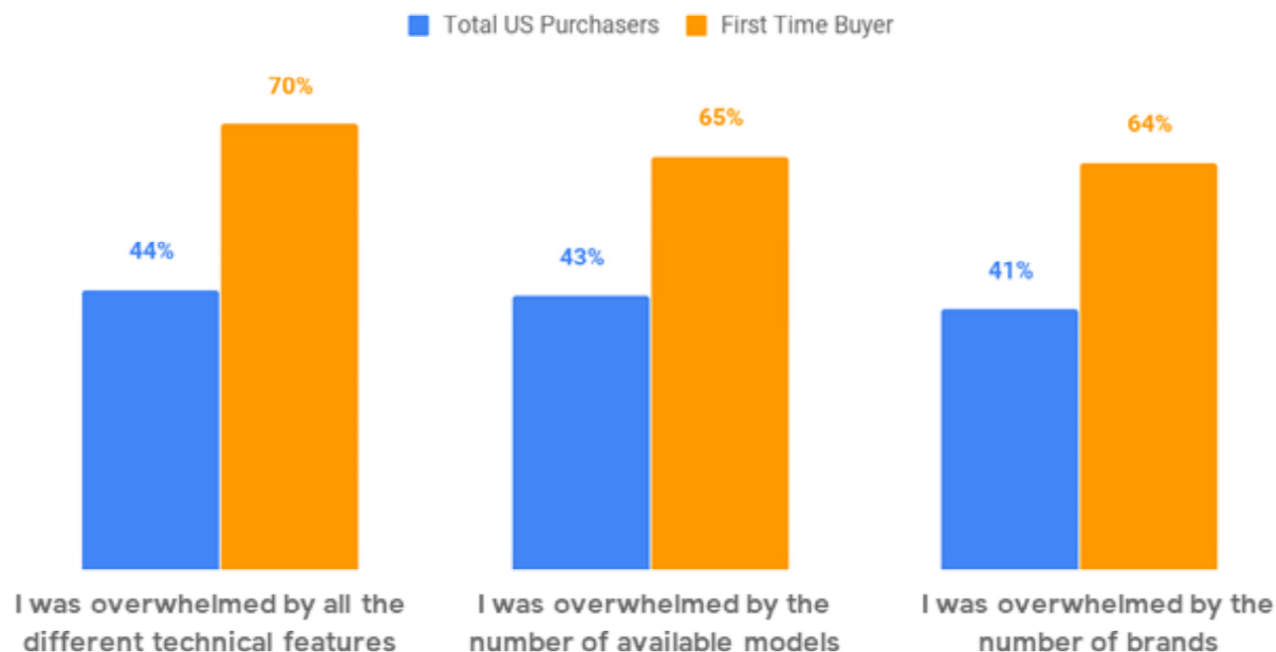
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Many shoppers found the amount of options related to their smartphone purchase overwhelming, especially first time smartphone buyers.



B12. Thinking back on the process you went through to shop for and ultimately purchase your smartphone, how much do you agree or disagree with the following statements?
Base: U.S. Smartphone Purchasers (n=2015), First time buyers (n=429)

Google
24

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OS Switcher Profile

Google
25

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A quarter of Android purchasers are closed off to ever considering iOS due to preference of OS and Google Play.

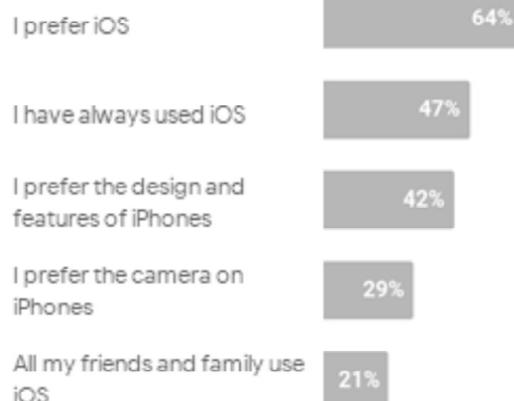
Top BARRIERS to considering another OS



Would you ever consider purchasing Android in the future?

25%
Extremely Unlikely

Why not?



Would you ever consider purchasing iOS in the future?

24%
Extremely Unlikely

Why not?



C5b/c. How likely are you to purchase a smartphone that runs on an Android operating system in the future? Please select why you would never consider purchasing a smartphone that runs on an Android operating system in the future. Base: U.S. Smartphone iPhone Purchasers (n=705), U.S. Smartphone Purchasers Extremely Unlikely to Buy Android (n=201)
C5e/g. How likely are you to purchase a smartphone that runs on the iOS operating system in the future? Please select why you would never consider purchasing a smartphone that runs on an iOS operating system in the future. Base: U.S. Smartphone Android Purchasers (n=1310), U.S. Smartphone Purchasers Extremely Unlikely to Buy Android (n=328)

Google

EXHIBIT 2903.R-026

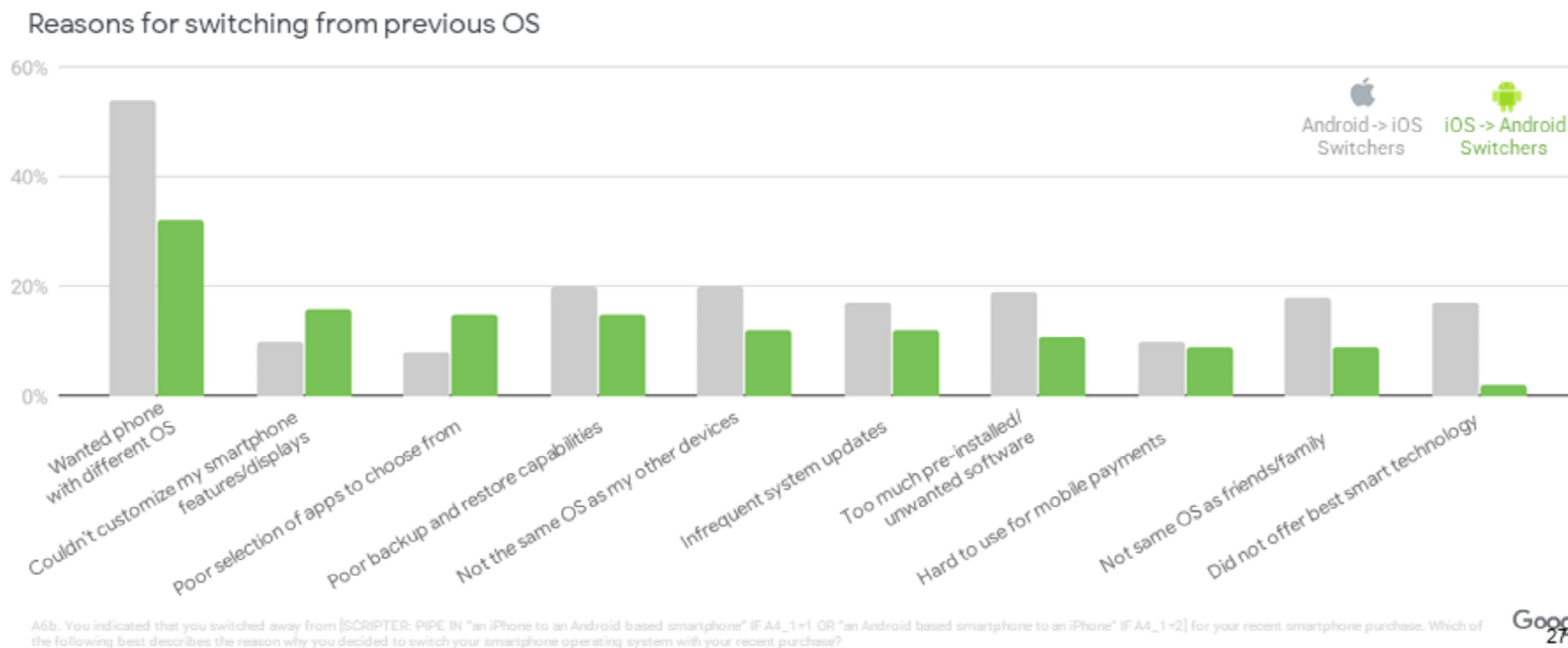
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Android to iOS switchers believe iOS offers less unwanted software and smarter technology.



- Tables 105-106

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While the number of OS switchers is small, those that switched to iOS tend to be younger and live in urban areas.



iPhone switchers threaten Android in all device tier groups. 50% of switchers bought iPhone 8/8+/X; 40% purchased iPhone 6/7 series, and 10% purchased SE/5 series.

	Android -> iOS Switchers	iOS -> Android Switchers*	US Shopper Average
Purchased High-Tier phone	69% ↑	65% ↑	52%
Millennials	68% ↑	53%	50%
Knew exactly which brand they wanted	61%	44% ↓	58%
Urban living	53% ↑	33%	39%
Signed fixed contract	39%	54% ↑	36%
Switched mobile carriers	37% ↑	41% ↑	28%

Base: U.S. Smartphone Purchasers (n=2015), iPhone to Android (n=67)*; Android to iPhone (n=133)

↑ Indicates significant difference from U.S. Total at a 90% Confidence Level

*Small base, interpret results with caution

Google
28

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Switchers to iOS placed added emphasis on processing speed and camera quality. Switchers to Android more focused on battery and price.

OS Switchers: Feature Importance Summary (% Rated 'Very Important' on 5 pt Scale)

	Android -> iOS Switchers	iOS -> Android Switchers*	US Shopper Average
Processing speed	68% ↑	55%	58%
Camera quality	67%	54% ↑	54%
Long battery life	66% ↑	75%	66%
Operating system	61% ↑	51%	59%
Display quality	60% ↑	48%	52%
Sound quality	60% ↑	46%	52%
Gets latest system updates	59% ↑	48% ↓	52%
Security	55% ↑	40%	52%
Exterior feel/appearance	51% ↑	40%	40%
Portability (slimness & weight)	51% ↓	43% ↑	41%
Price	51% ↑	70%	60%
Good apps for work	47%	29%	34%

Base: U.S. Smartphone Purchasers (n=2015), iPhone to Android (n=67)*; Android to iPhone (n=133)

↑ Indicates significant difference from U.S. Total at a 90% Confidence Level

*Small base, interpret results with caution

Android -> iOS switchers were influenced much more by OEM websites and TV ads, while iOS -> Android switchers were heavily influenced by retail associates.



OS Switchers: Important Shopping Activities

	Android -> iOS Switchers	iOS -> Android Switchers*	US Shopper Average
Sales Associate/Demo	48% ↓	74% ↑	55%
TV Ads	43% ↑	33%	29%
OEM Websites	40% ↑	27%	28%
Family Advice	32% ↑	20%	24%
Social Media Opinions	28% ↑	21%	19%

The average iOS to Android switcher took 1-2 weeks to purchase, while the average Android to iOS switcher took 2 - 4 weeks to complete the purchase process.

Base: U.S. Smartphone Purchasers (n=2015), iPhone to Android (n=67)*; Android to iPhone (n=133)

↑↓ Indicates significant difference from U.S. Total at a 90% Confidence Level

*Small base, interpret results with caution

Google
30

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First-time smartphone buyers

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Who are first-time smartphone purchasers?



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21% of U.S.
purchasers

Skew younger & male

- 71% male
- 61% millennial (18-35 y/o) vs. 50% total smartphone buyers

Value voice assistant and phones without pre-installed apps

- First-time buyers were significantly more likely than overall smartphone shoppers to look for voice assistant capabilities (41%) and phones free of pre-installed apps (39%)

More influenced by peers & family

- 41% saw recommendations from family and friends as highly important to purchase (vs. 28% of all shoppers).
- More likely to rank having the same brand and OS as friends and family as important

More online shopping activity & purchasing

- 46% of first-time purchasers purchased online (vs 37% all shoppers), and 80% shopped around online.

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OEM Scorecard

Google
33

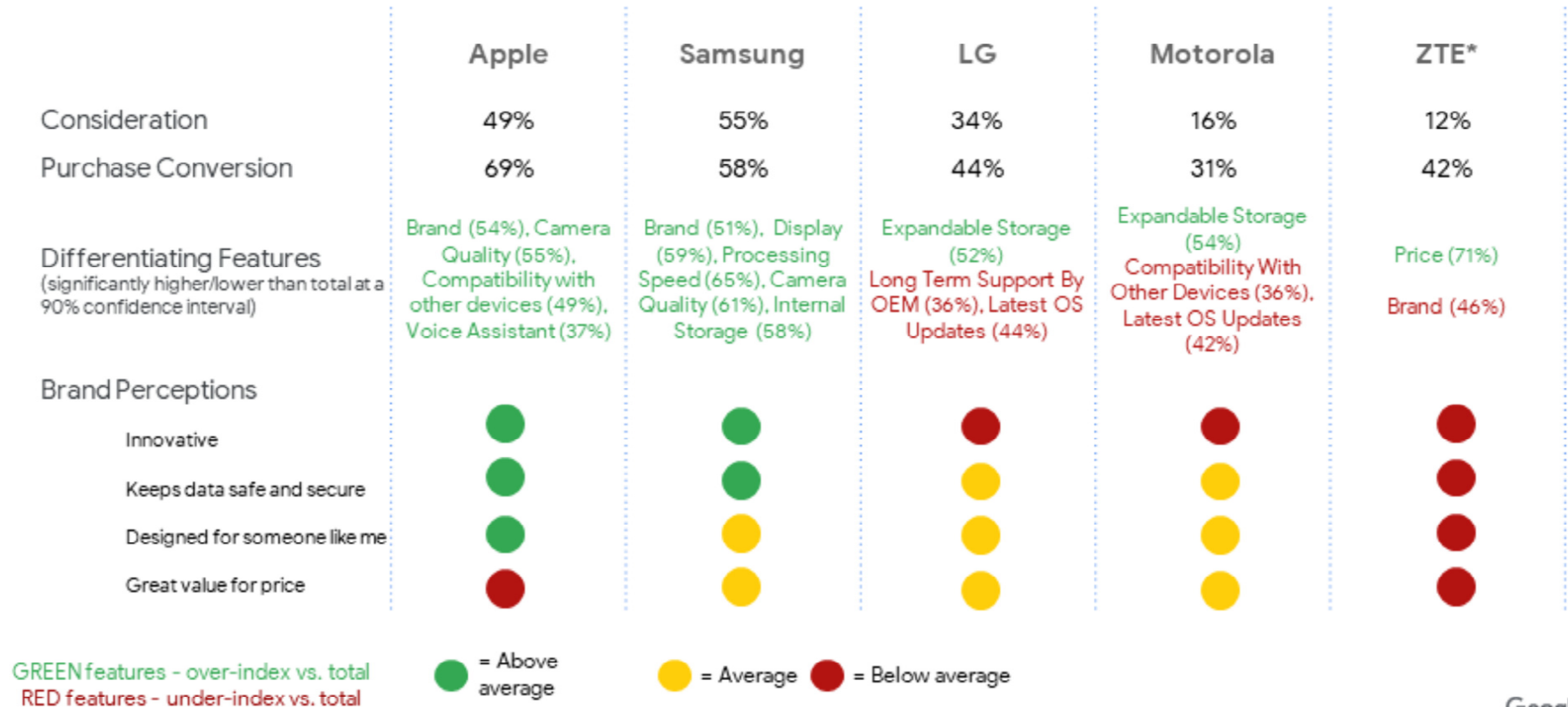
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OEM Scorecard



Base: U.S. Smartphone Samsung Purchasers (n=637), U.S. Smartphone LG Purchasers (n=319), U.S. Smartphone Motorola Purchasers (n=114), U.S. Smartphone ZTE Purchasers (n=85)*.

Google
34

- Differentiating Features - Significantly higher/lower than total at a 90% confidence interval
- Brand Perceptions - This chart takes C9 perception data, indexes it to total Android perceptions, then compares OEM users against the total Android perceptions. Indexes of 111+ are colored green, yellow is 110-96, and red is 95 or lower.

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Appendix

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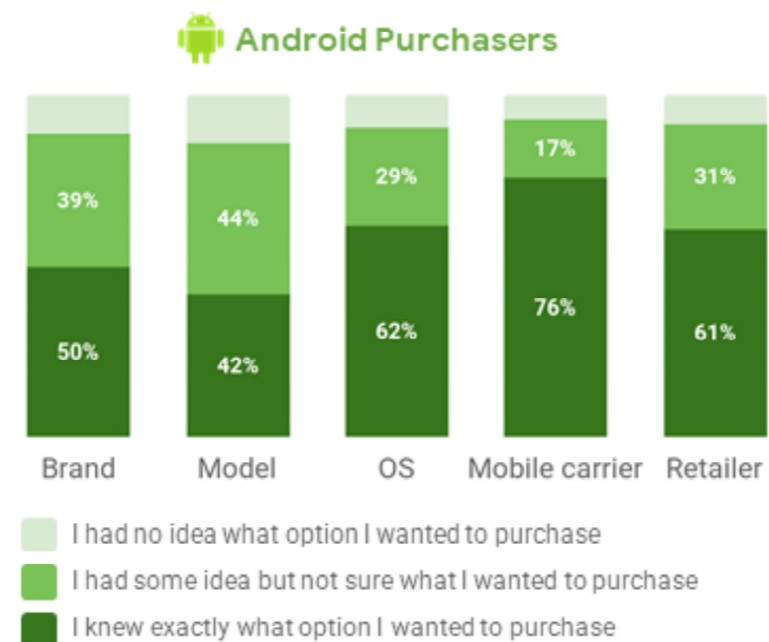
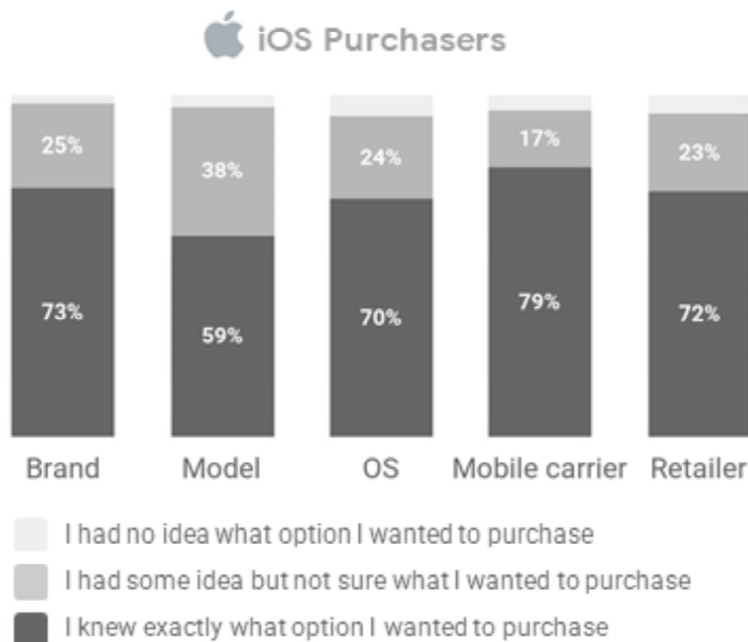
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Most shoppers went into the buying process having some sense of what they wanted, though Android buyers are less likely to be decided on specific Brand and Model.



A2. For each of the purchase factors below, please indicate how you felt when you initially started thinking about purchasing your smartphone.
 Base: U.S. Smartphone Android Purchasers (n=1310), U.S. Smartphone iPhone Purchasers (n=705)

Google
38

- Table 62-66

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While most shoppers cited value as a top priority, having advanced features was also highly important.

(% top 2 box out of 5)

	US Total	Apple	Samsung	LG	Motorola	ZTE*	Google*
Great value - I wanted the best value for my money	89%	87% ↓	90%	91%	93%	93%	79%
High tech - I wanted a phone with the most advanced features	77%	82% ↑	82% ↑	67% ↓	67% ↓	73%	73%
Style - I wanted a phone that reflects my personal style	62%	67% ↑	65%	52% ↓	52% ↓	52% ↓	71%
Belonging - I wanted a phone that makes me feel I'm a part of a community	45%	54% ↑	49% ↑	30% ↓	31% ↓	33%	41%
Status - I wanted a phone that helps me stand out and reflect my status	45%	53% ↑	47%	34% ↓	36% ↓	34%	41%
Being different - I wanted a phone different from what everyone else has	44%	51% ↑	46%	31% ↓	36%	36%	53%

A14. Please indicate the extent to which the following features were important to you when shopping for your new smartphone. Using the scale below, please rate each of the following items in terms of importance to you personally.
 Base: U.S. Smartphone Purchasers (n=2015), U.S. Smartphone iPhone Purchasers (n=705), U.S. Smartphone Samsung Purchasers (n=637), U.S. Smartphone LG Purchasers (n=319), U.S. Smartphone Motorola Purchasers (n=114), U.S. Smartphone ZTE Purchasers (n=85)*, U.S. Smartphone Pixel Purchasers (n=36)*; *Small base, interpret results with caution
 [↓] Indicates significant difference from U.S. Total at a 90% Confidence Level

Google
37

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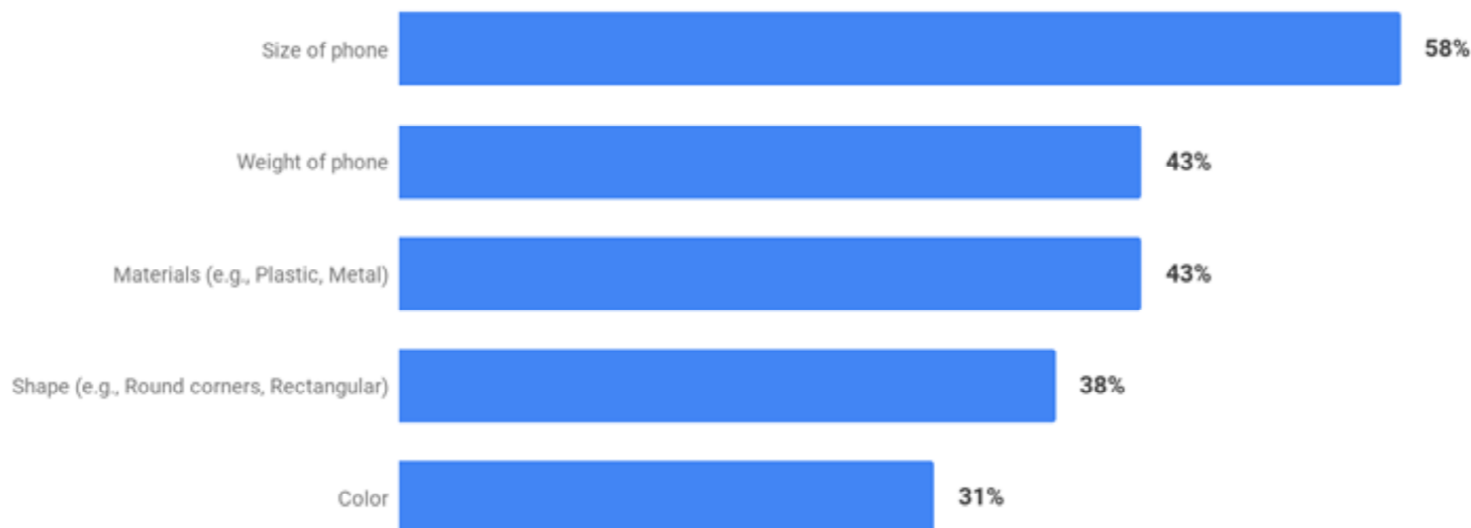
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Drill Down: Exterior/Appearance Feature Importance (top box out of 5)

(Total Smartphone Purchasers)



A18b. Please indicate the extent to which of the following "Exterior feel and appearance (overall style, color, material, finish, etc.)" factors regarding your smartphone did you consider important when purchasing one? Base: U.S. Smartphone Purchasers T2B Importance in Appearance (n=1524)

Google
38

- Table 193

EXHIBIT 2903.R-038

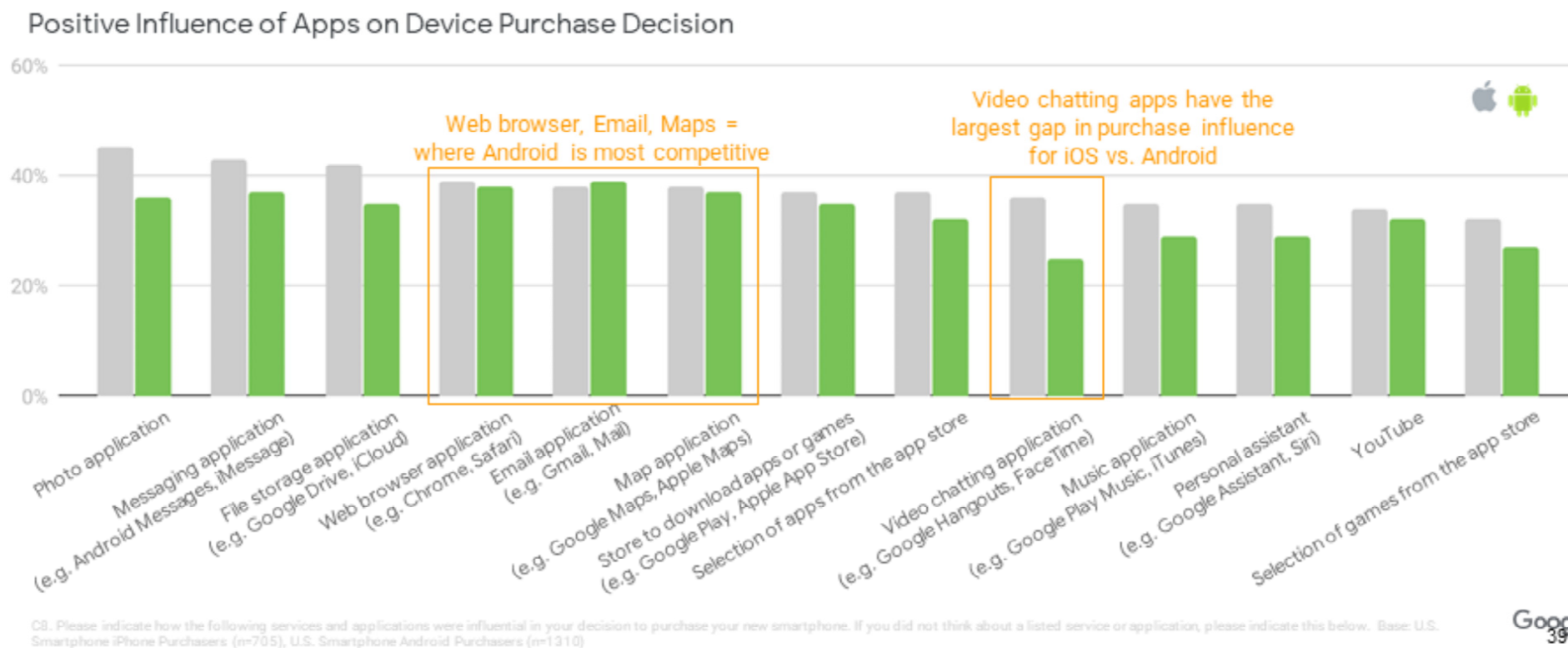
GOOG-PLAY-010847520

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iOS apps tend to be more influential to the purchase decision than Android apps are.



- Table 560

EXHIBIT 2903.R-039

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iOS Switchers feel more positive about iOS apps than Android Switchers



Positive Influence of Apps on Device Purchase Decision (top box out of 5)



Android Switchers *



iOS Switchers

Photo application	34%	42%
Messaging application (e.g. Android Messages, iMessage)	33%	50%
File storage application (e.g. Google Drive, iCloud)	38%	45%
Web browser application (e.g. Chrome, Safari)	31%	35%
Email application (e.g. Gmail, Mail)	31%	46%
Map application (e.g. Google Maps, Apple Maps)	35%	36%
Store to download apps or games (e.g. Google Play, Apple App Store)	27%	42%
Selection of apps from the app store	29%	41%
Video chatting application (e.g. Google Hangouts, Google Duo, FaceTime)	20%	38%
Music application (e.g. Google Play Music, iTunes)	24%	28%
Personal assistant (e.g. Google Assistant, Siri)	27%	43%
YouTube	29%	35%
Selection of games from the app store	21%	38%

CS. Please indicate how the following services and applications were influential in your decision to purchase your new smartphone. If you did not think about a listed service or application, please indicate this below.
Base: U.S. Switchers to Android (n=67*), U.S. Switchers to iOS (n=133); *Small base, interpret results with caution

Google
40

- Table 560

EXHIBIT 2903.R-040

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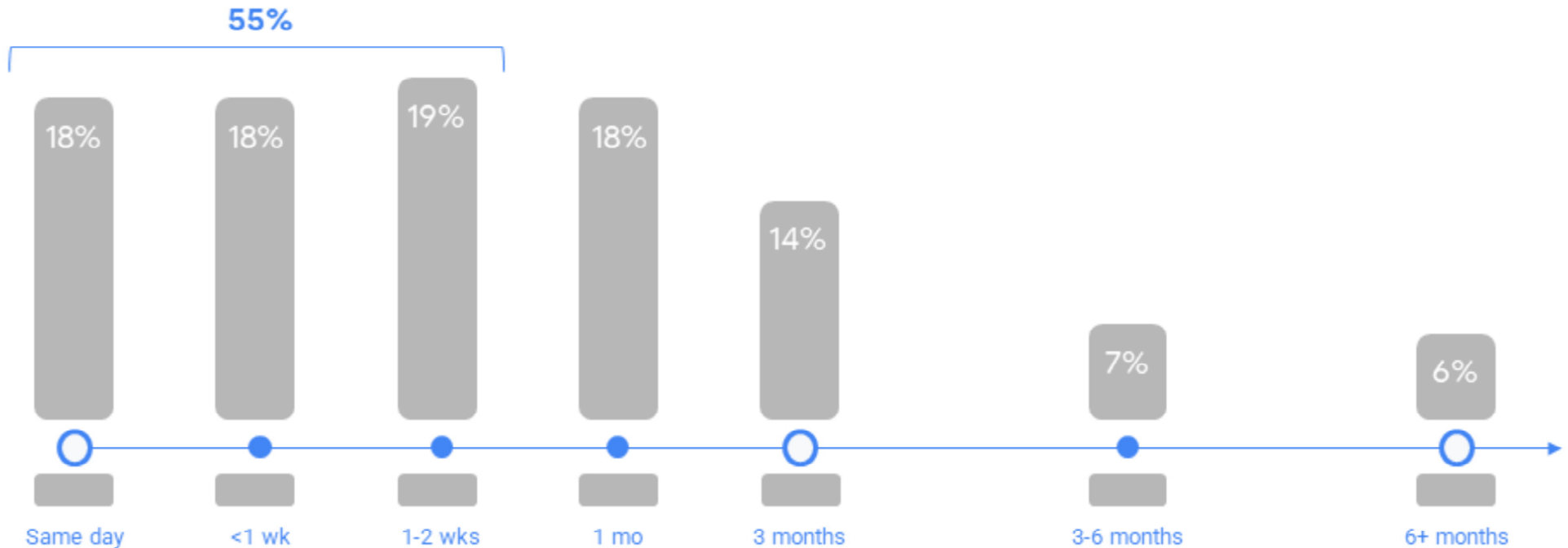
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Over half of purchasers completed the shopping process within two weeks.

Length of purchase journey



A12a. How long did you think about buying a new smartphone before making the purchase? *Timeline illustrative/not to scale
 † Indicates significant difference from U.S. Total at a 90% Confidence Level

Google
41

- Table 128

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Brand Perceptions by OEM purchasers



	Samsung	LG	Motorola	ZTE*
Great value for price	68%	68%	68%	64%
Designed for someone like me	71%	64%	67%	45%
Compatible with other devices	71%	56%	57%	52%
Easy to use	68%	59%	60%	49%
Highly customizable	64%	54%	54%	33%
Easy to transfer data/apps	63%	52%	41%	45%
Has the best camera quality	62%	47%	41%	31%
Fast processing	62%	51%	38%	33%
Keeps my data safe and secure	61%	51%	43%	35%
Easy to fix if errors occur	58%	52%	50%	31%
Innovative	61%	43%	44%	31%
Good tech support	60%	45%	47%	23%
Does not freeze up	57%	50%	37%	37%
Most advanced OS	61%	42%	39%	33%
Good platform for dealing with security threats	58%	45%	40%	31%
Provides user privacy	56%	46%	37%	35%
Is a popular brand	55%	41%	39%	29%
Without unwanted pre-installed software	50%	39%	30%	32%
Offers the best games	50%	39%	32%	29%

C9. Please indicate, using the grid shown below, which smartphone brand is best represented by the following factors.

Base: U.S. Smartphone Samsung Purchasers (n=637), U.S. Smartphone LG Purchasers (n=319), U.S. Smartphone Motorola Purchasers (n=114), U.S. Smartphone ZTE Purchasers (n=85)*.

Google
42

- Table 142

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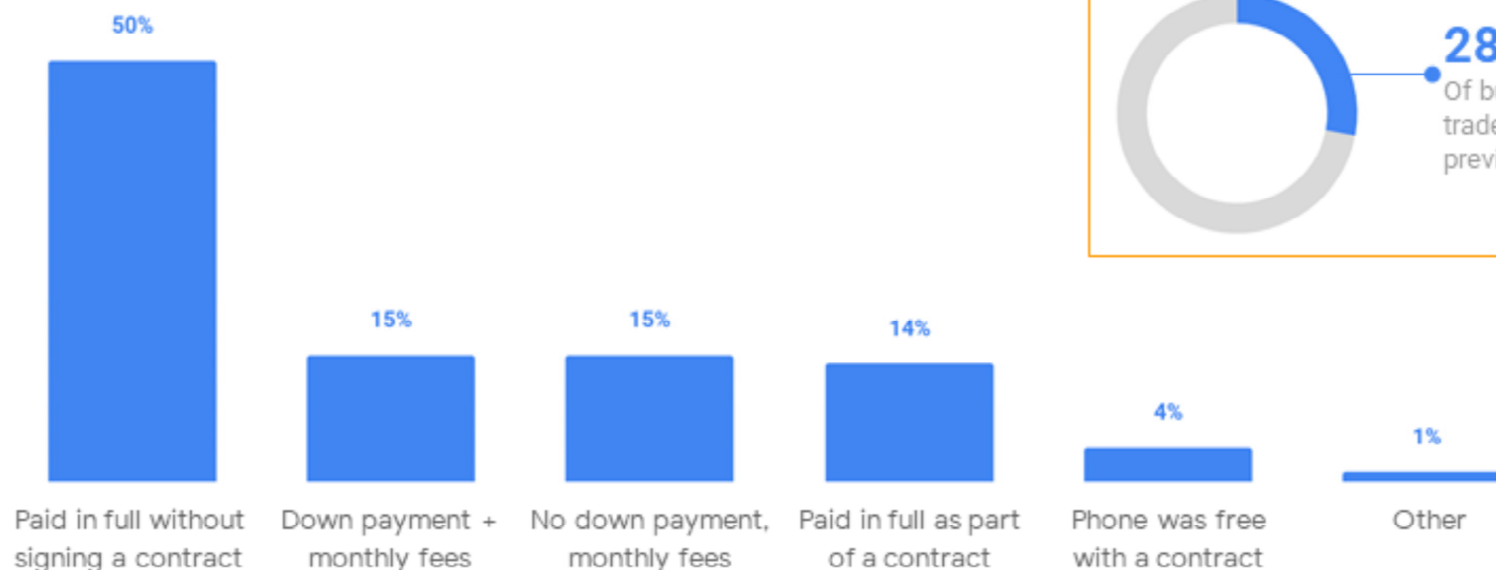
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Half of US smartphone purchasers bought the device by paying in full without signing a contract.

How did you pay for your new smartphone?



B6. Which of the following best describes how you paid for your new smartphone? Base: U.S. Smartphone Purchasers (n=2015)
 B7. Did you trade-in or sell another device to receive credit toward your new smartphone?

Google

43

- Table 451, 454

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